The 1980-81 Economic Review of Travel in America

U. S. Travel Data Center

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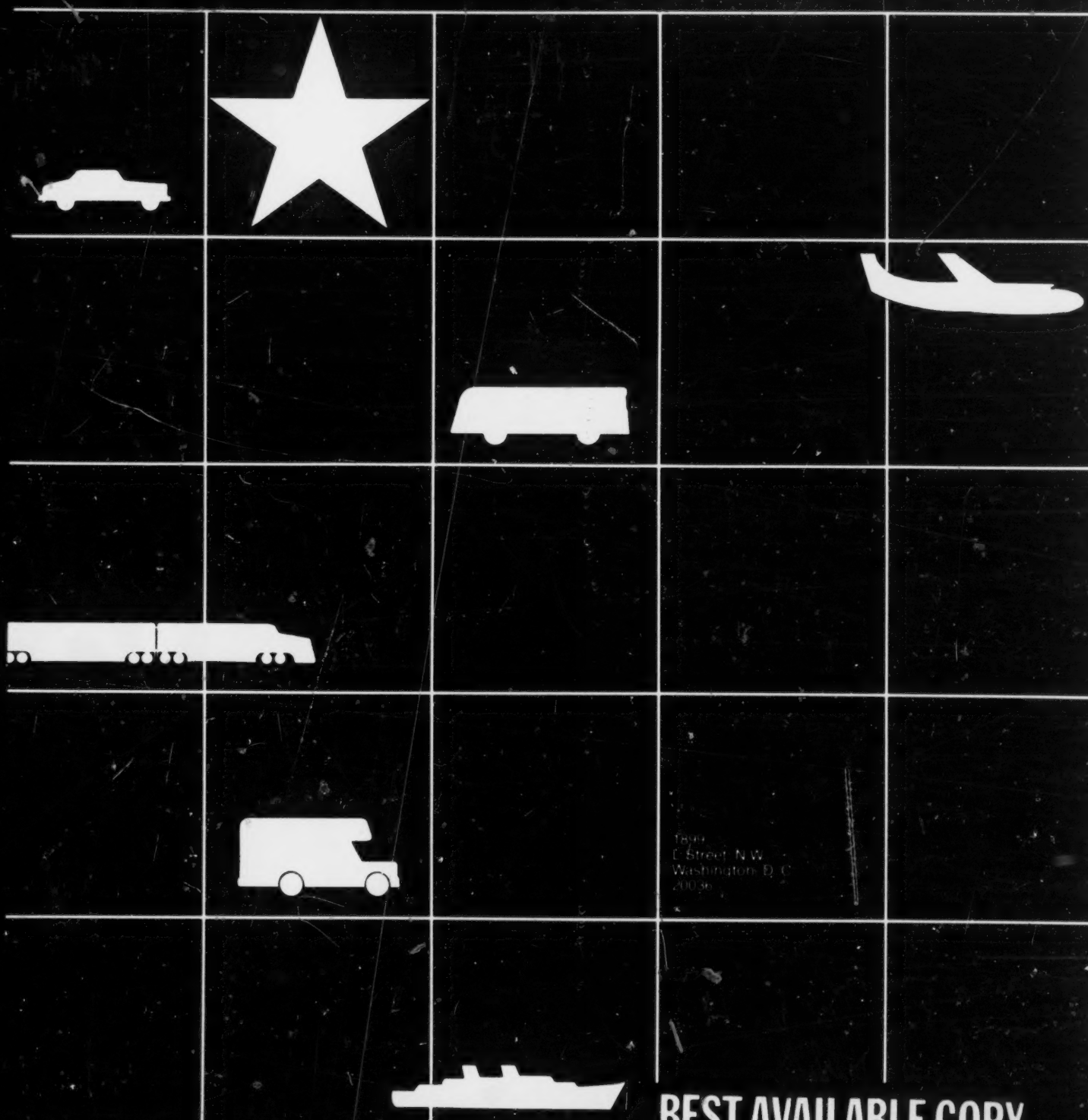

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THE 1980-81 ECONOMIC REVIEW OF TRAVEL IN AMERICA

United States Travel Data Center

Washington, D. C.

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The United States Travel Data Center is the national, non-profit center for travel and tourism research. Since its establishment in 1973, the Data Center has devoted itself to advancing the common interests of the travel industry and the public it serves by encouraging, sponsoring and conducting statistical, economic, and scientific research concerning travel, the travel industry and travel-related industries. In pursuit of this objective, the Data Center gathers, analyzes, publishes and disseminates the results of such research, and cooperates with all government agencies, private industry and academic institutions with similar purposes and objectives. The Data Center is financed through publication sales, membership dues and contract research. It is located in Suite 610, 1899 L Street, N.W., Washington, D. C. 20036.

Earl E. Ditmars, Chairman

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I. INTRODUCTION

The economy influences travel away from home and is affected by it. However, the plethora of data available from government and other national sources has tended more to obscure this relation-ship than to improve understanding.

This report is designed to portray the economic aspects of travel and tourism to, from, and within the United States. Developments in 1980 are discussed in the perspective of the decade, and projections for 1981, based upon the 1981 Travel Outlook Forum, recent industry forecasts, and the Data Center's own studies, are presented.

Travel

The subject of this report is travel away from home. Over the years there has been considerable discussion of the appropriate definition of this activity, and a consensus appears to be forming around the one advanced by the National Tourism Resources Review Commission in 1973: trips of 50 one-way miles or more for any purpose except commuting to and from work.

In practice, few studies have incorporated this definition. It is more common to measure U.S. travel 100 miles or more away from home; or overnight stays away from home; or national, state or local border crossings. The travel activity data discussed in this report reflect these differences but have been chosen to approximate the consensus definition as closely as feasible.

The word, "tourism," is avoided in this report as being a confusing term. While it is often used to denote travel away from home in many parts of the world, in American parlance, it connotes travel for pleasure only. When the term does arise herein, it is as a synonym for travel away from home, to emphasize that we are interested in tourism-type travel, rather than local traffic.

Travel Industry

Travelers participate in a number of different activities when they are away from home. They purchase public transportation, gasoline, food, lodging, entertainment, recreation, and a number of other incidental goods and services. U.S. businesses provide these items to travelers and to local residents and others as well.

Businesses are commonly grouped together into industries by the type of product they produce. Consequently, travelers patronize a number of different industries as conventionally defined.

For this reason, we cannot define a "travel industry" as such. We can, however, develop a spectrum of types of U.S. businesses based upon their dependence on traveler expenditures for business receipts. In the U.S., "primary travel-related businesses," those which depend upon travel expenditures for more than one-third of total sales receipts, include intercity bus, rail and air passenger carriers; eating and drinking places; hotels, motels and motor hotels; campgrounds and transient trailer parks; car rental firms; and amusement and recreation services. By charting trends in this group of businesses, we can infer trends and con-ditions in the "travel industry" as a whole.

Unfortunately, data are not readily available on each of these travel industry sectors. The reader will note that the components making up the travel industry in this report change from chapter to chapter, depending on the statistics available. However, we feel that the data do indicate how the travel industry is faring and how it is contributing to the U.S. economy.

Automobile travel including that by auto, truck, recreational vehicle, and motorcycle comprises 60 percent to 80 percent of all travel away from home in this country, depending upon the definition. The type of business that could best represent this transportation activity is gasoline service stations. However, traveler expenditures on auto transportation comprise about 20 percent of total sales of these establishments. Consequently, we decided to exclude gasoline service stations from the travel industry represented in this report. By so doing, we exclude businesses representing a large sector of travel activity but improve our chances that the travel industry measured herein actually indicates travel-related business developments.

While some data on travel and the travel industry extend back more than a decade, a large part of the information we have from the federal government on receipts, prices, traffic and employment in travel-related businesses begins in 1972. As a result most of the past perspectives on travel and the industry provided in this report begin with 1972.

While we always clarify which activities and types of businesses are included in this report, the charts and analysis focus on travel and the industry that services it as a whole, rather than on its component parts. Travel away from home is a distinctive human activity, requiring a variety of goods and services. The consumption of these goods and services makes the establishments which provide them necessarily interdependent. People who travel need a mode of transportation , a place to visit, shelter, and food. Oftentimes, they demand entertainment, recreation and other items as well.

In a very real sense, we would not have hotels without transportation, nor would people travel without a place to stay. Similar interdependence among other traveler activities can be

easily seen. Consequently, we feel travel and the travel industry is best viewed in its entirety and have attempted to emphasize this perspective.

A traveler's purchase from a retail business begins a productive economic process that stretches through wholesale, manufacturing, extractive, transportation and service firms. There are indications that the indirect impact of such a purchase can dwarf the direct impact on the travel-serving retail business.

This review concentrates on the direct impact of travel and tourism on the U.S. economy. This is not to say that the indirect impact is unworthy of review but that the data here are not nearly as well developed. It is hoped that future editions of this review can include sound estimates of the "multiplier" impact of travel expenditures in the U.S. as well as the direct effects.

Organization of the Report

This review is organized in eight chapters. Recent developments in travel activity along with current industry trends placed in the perspective of the last decade are discussed in Chapter 2. Chapter 3 presents a discussion of travel price inflation. Chapter 4 focuses on the unique abilities of the industry to create jobs.

Chapter 5 highlights the dependence of travel on petroluem fuel supplies and emphasizes the relatively small share of energy consumption attributable to the activity.

Chapter 6 presents a discussion of international travel trends and their effect on the U.S., while Chapter 7 surveys regional trends in travel.

Chapter 8 provides a summary of travel and the economy.

The appendices provide background information essential to the report. Appendix A presents the base data used for calculating the charts included in the previous chapters. Appendix B is a list of sources used in the preparation of the review.

II. TRAVEL ACTIVITY AND INDUSTRY TRENDS

Travel away from home is a prominent part of the American way of life. During the average month in 1980, one out of every five Americans took a trip to a place 100 miles or more away from home.

On the average day in 1980, twelve million Americans were traveling away from home, a number larger than the population of 47 of our 50 states. Indeed, Americans took almost as many trips out of town as they did to the movies in 1980.

Table II-1: U.S. Travel Away from Home for Selected Trip Purposes, 1979-80 (millions of person-trips)

Purpose	1979	1980	Percent Change
All travel	1,110	935	-15.7%
Vacation travel	624	578	-7.3
Business/convention travel	155	135	-13.0%

Source: U.S. Travel Data Center, National Travel Survey.

The Data Center's National Travel Survey provides monthly estimates of U.S. travel to places 100 miles or more away from home. A standard measure of travel activity is the "person-trip," recorded each time one person goes on a trip.

As indicated in Table II-1, U.S. travel declined in 1980, primarily in response to the economic recession during the first half of the year, the President's economic restraint program, and soaring gasoline prices and air fares. Business-related travel was affected more than vacation travel, as consumers found ways to fit their traditional vacation trip into their limited budgets, ways apparently not feasible in business.

Table II-2: U.S. Nights Away from Home for Selected Trip Purposes, 1979-1980 (million of person-nights)

Purpose	1979	1980	Percent Change
All travel	4,745	4,302	-9.3%
Vacation travel	3,262	3,238	-0.7
Business/convention Travel	589	473	-19.8%

Source: U.S. Travel Data Center, National Travel Survey.

Consumers tried to minimize the impact of soaring transportation costs by taking fewer trips and by staying longer at their destinations in 1980. Table II-2 indicates practically no change in the number of vacation nights away from home, despite the significant reductions in trips.

Business travelers actually cut back their nights away from home more than their trips, as they curtailed travel to distant destinations.

Travel's Economic Impact

Travelers purchase goods and services, producing business receipts for retailers. These retailers use part of their receipts to pay wages and salaries to their employees. During the process, tax revenue is generated for Federal, state and local governments.

Table II-5: Measures of Travel's Economic Contribution, 1980: Preliminary

Expenditures in U.S.	$157.0 billion
Payroll income generated	$34.4 billion
Employment generated	4.5 million jobs
Federal tax revenue generated	$ 8.6 billion
State tax revenue generated	$ 5.9 billion
Local tax revenue	$ 1.9 billion

Source: U.S. Travel Data Center.

As Table II-5 indicates, 22 cents of each traveler dollar becomes wage and salary (payroll) income. Travel directly generated 2.6 percent of total wage and salary income during 1980. Travel expenditures directly supported 5 percent of U.S. payroll employment.

The traveler dollar generated 16 cents in tax revenue for federal, state and local goverments. Travel is directly responsible for generating 4.3 percent of total tax revenue for all governments in the U.S.

Travel generates demand for many different goods and services and produces receipts for a number of different U.S. industries. The diversity of travel tends to obscure its role in our economy. We cannot point to factories around the country and say, "This is the travel industry." Nor can we count items produced by a plant and say, "This is travel's output."

But travel's breadth and diversity should not be allowed to hide the fact that it is a major sector of the U.S. economy. Travel expenditures exceed the sales of all but two retail industries. Travel-generated payroll surpasses that of the steel and automobile manufacturing industries combined. Travel generates more jobs than are found in 44 of our fifty states. In short, travel deserves to be recognized as contributing substantially to the sales, income and employment we enjoy from our economy.

Table II-6: Travel Expenditures in the U.S. Compared to Major Retail and Service Industry Receipts, 1980 ($ billions)

Industry	Sales
Food stores	$212
Automotive dealers	166
Travel and tourism	157
General merchandise stores	117
Business services	111

Source: U.S. Travel Data Center, U.S. Bureau of the Census.

In short, the economic recession and rapid inflation depressed travel by both consumers and business people in 1980. However, consumers were able to adjust their plans to a large extent and travel on vacation.

Travel Spending

U.S. travelers spent nearly $165 billion traveling away from home in 1980, for an average of $728 for every person in the population. Nearly 90 percent of this spending is for domestic travel, as Table II-3 indicates. However, spending on foreign travel grew faster in 1980, despite unfavorable exchange rates. As usual, travel spending by Americans rose faster than Gross National Product.

Table II-3: U.S. Travel Expenditures, 1979-80 ($ billions)

Purpose	1979	1980	Percent Change
Spending on domestic travel	$134	$147	9.7%
Spending on Foreign travel	15	17	13.3%
Total	$149	$164	10.0%

Source: U.S. Travel Data Center, U.S. Department of Commerce: preliminary.

In investigating the economic impact of travel, we should be more interested in travel spending in this country than travel spending abroad. All travelers in America spent $157 billion in 1980, up 11 percent from the previous year (Table II-4). Americans accounted for 94 percent of the total, but foreign spending grew twice as fast. Traveler spending here equaled 6 percent of our Gross National Product in 1980 and grew 20 percent faster.

Table II-4: Travel Expenditures in the U.S., 1979-1980 ($ billions)

Source	1979	1980	Percent Change
U.S. residents	$134	$147	9.7%
Foreign visitors	8	10	21.7
Total	$142	$157	10.6%

SOURCE: U.S. Travel Data Center, U.S. Department of Commerce: preliminary.

Travel Industry Receipts

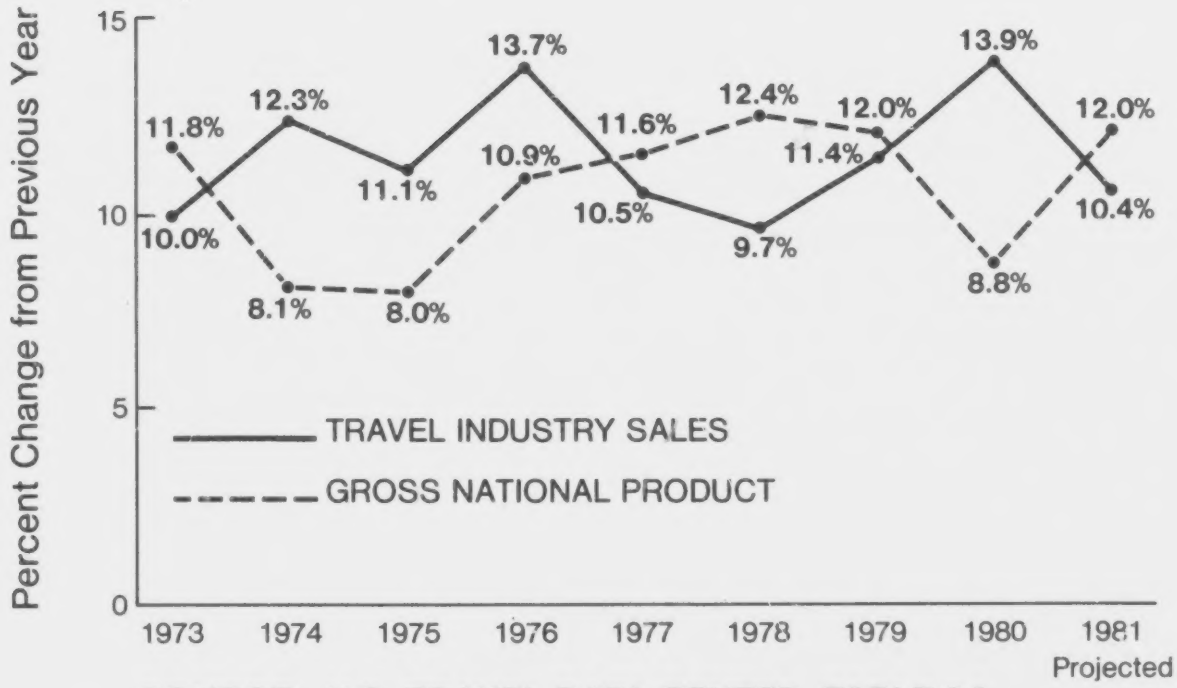
Total business receipts for the travel industry has grown faster than Gross National Product (GNP) in each of the last seven years (Figure 2A). In 1980, they were 165 percent greater than in 1972.

FIGURE 2A
TRAVEL SALES HAVE OUTPACED GNP SINCE 1972

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 2A.*

Since 1972, travel industry receipts have grown at a compound rate of nearly 12 percent a year. In 1980, receipts soared 13.9 percent, the best performance of this measure on record (Figure 2B). Sales are projected to grow at a slower rate in 1981, perhaps even slower than GNP.

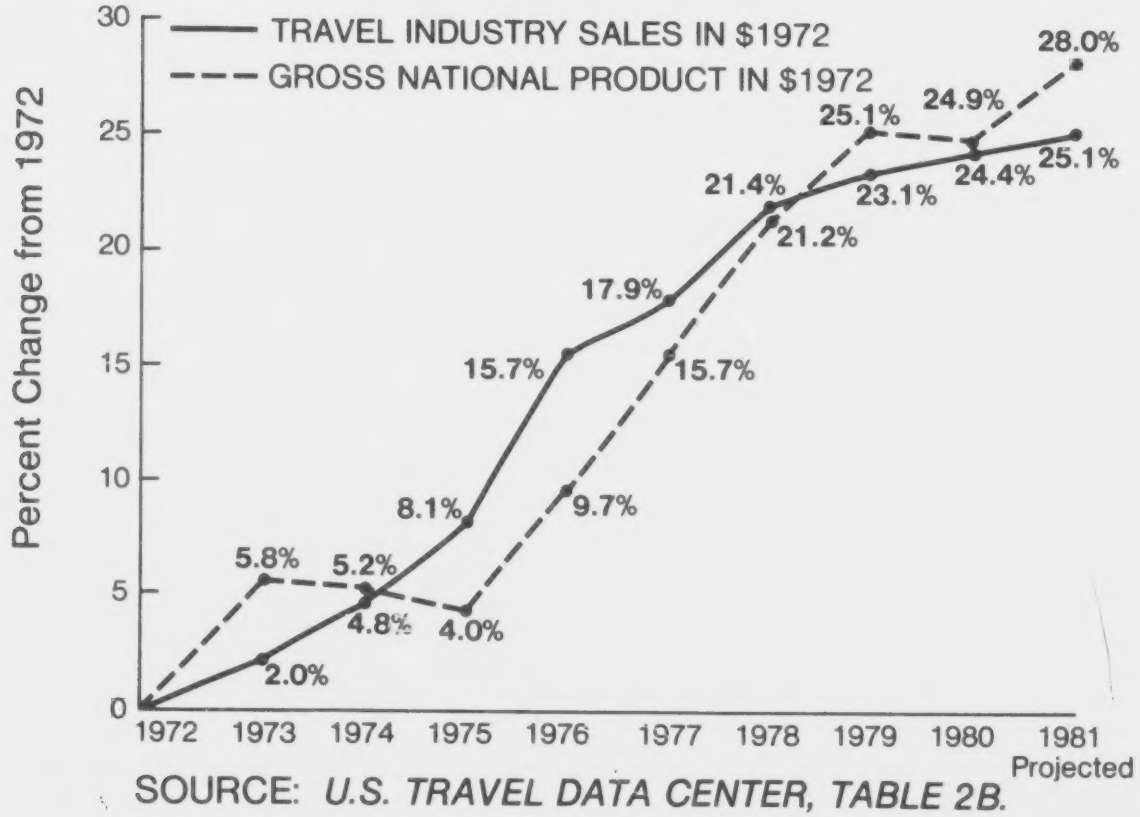
FIGURE 2B
TRAVEL SALES GAIN EXCEEDED LONG-TERM AVERAGE IN 1980



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 2A.*

Industry sales in current dollars combine real growth in output and price increases. In Figure 2C, sales have been deflated to represent real output for both the travel industry and the GNP.

FIGURE 2C
REAL TRAVEL INDUSTRY SALES GROWTH HAS MATCHED GNP SINCE 1972



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 2B.*

Travel industry output grew 25 percent in real terms over the period we can measure, about the same performance as GNP. This works out to a compound annual growth rate of 2.8 percent per year, considerably smaller than for current dollar sales.

For most recent years, travel output adjusted for inflation has grown at a slower rate than the economy as a whole (Figure 2D). The gasoline shortages in 1979 and the recession in 1980 produced the lowest real growth rates on record for the period. Travel output did not decline in 1980 as the economy's real output did. But real GNP is expected to outperform the travel industry in 1981, as the industry wrestles with the effects of high fuel prices and an uncertain economy.

Travel/tourism Transporation Activity

Travel away from home totaled nearly 1.4 trillion passenger miles in 1980. Travelers drove, rode or flew the equivalent of a round-trip between New York and Los Angeles for every man, woman and child in the country.

FIGURE 2D
REAL TRAVEL SALES GROWTH HAS BEEN SLOW IN RECENT YEARS

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 2B.*

Since 1972, common carrier travel, dominated by the nation's airlines, has grown more than three times as fast as automobile travel (Figure 2E). The Arab oil embargo and gasoline price hikes in 1974, the gasoline shortages of 1979, and the soaring gas prices in 1980 all depressed highway travel away from home below previous years.

However, 1980 brought a dramatic decline in airline travel for the first time since World War II. Airlines were forced to raise fares drastically in response to soaring fuel costs. Prospects are little better for 1981. Airline travel is projected to decline for the second year in a row, while auto travelers, - adjusting to high but softening gasoline prices, are expected to boost travel significantly.

Travel by intercity bus and rail, the other two components of common carrier traffic, have shown gains for the period. Both are projected to post above-average increases for 1981.

Figure 2F indicates the bumpy progress of common carriers to supplant the automobile as the predominant means of travel away from home in America. Petroleum shortages boosted common carrier traffic at the expense of the automobile in 1974 and again in 1979. However, the carriers' share dropped as gasoline supplies returned to normal.

After reaching a high of nearly 18 percent in 1979, the common carrier share declined in 1980, with a further drop expected in 1981. Whether these carriers will once more show gains in share appears to depend most on relative price movements for gasoline and carrier fares and petroleum fuel supplies. It is too early to tell whether there may be a long-term trend toward the carriers and away from personal motor vehicles for travel away from home.

Small Businesses Dominate the Travel Industry

In 1977, the most recent year for which complete data are available, there were more than one-half million U.S. firms significantly involved in serving the traveler away from home. As indicated in Table II-7, 99 percent of these were small businesses according to the size standards established by the U.S. Small Business Administration.

A strength of an industry comprised of small businesses is the opportunities it offers for individuals to own their own firms and provide specialized services. This is certainly true of the travel industry.

However, there are problems. Small businesses are less able to weather business declines than large corporations. Moreover, energy, tax, and regulatory policies that discriminate against the travel industry will impact heavily on small businesses, many of which do not have the resources to endure them.

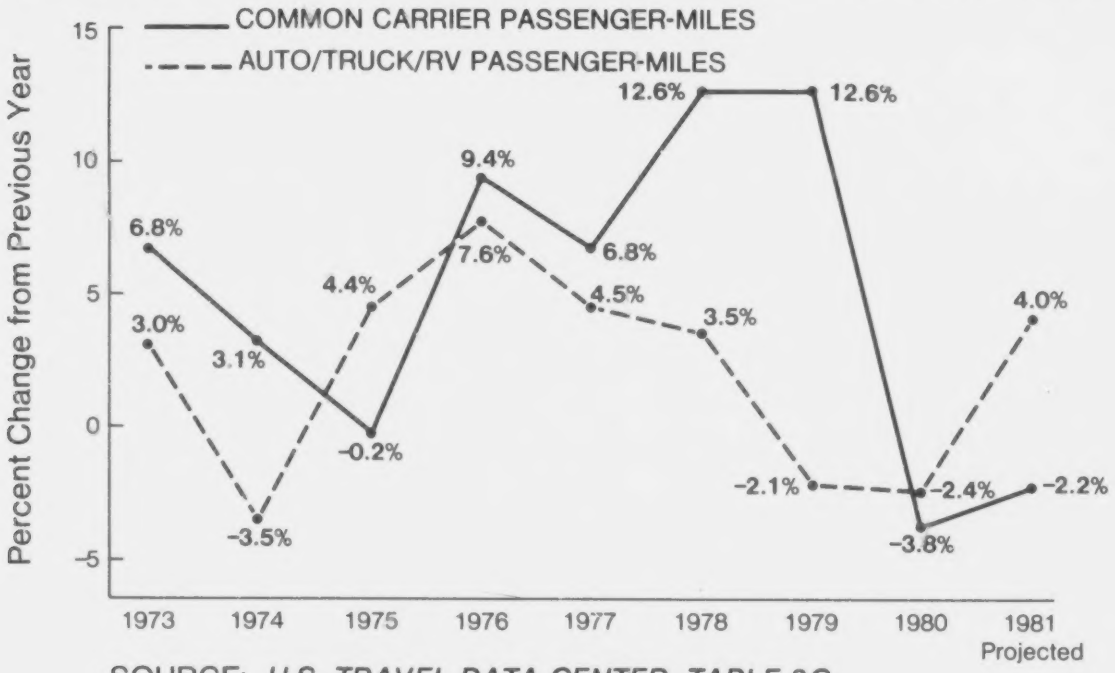
Public officials should take this into account along with the nation's commitment to fostering small business opportunities when forming national policies and priorities.

Table II-7: Small Business Firms and Total Firms in the Travel Industry, 1977

Sector	Total Firms	Small business firms	Small business as percent of total
Transportation			
Air	39	16	41.0
Bus	1,050	980	93.0
Rail	3	0	0.0
Lodging			
Hotels/motels	48,113	46,381	96.4
Campgrounds, trailer parks	18,745	18,726	99.9
Food service			
Eating and drinking places	319,195	315,288	98.8
Entertainment/recreation			
Amusement and recreation services	152,209	151,244	99.4
Travel industry	539,354	532,635	98.8

Source: U.S. Travel Data Center, based on data from U.S. Bureau of the Census, Census of Service Industries, Census of Retail Trade; Small Business Administration; American Bus Association; Amtrak; World Aviation Directory.

FIGURE 2E
COMMON CARRIER TRAVEL OUTPACED AUTO TRAVEL UNTIL 1980



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 2C.*

FIGURE 2F
COMMON CARRIER SHARE OF TRAVEL DECLINED IN 1980

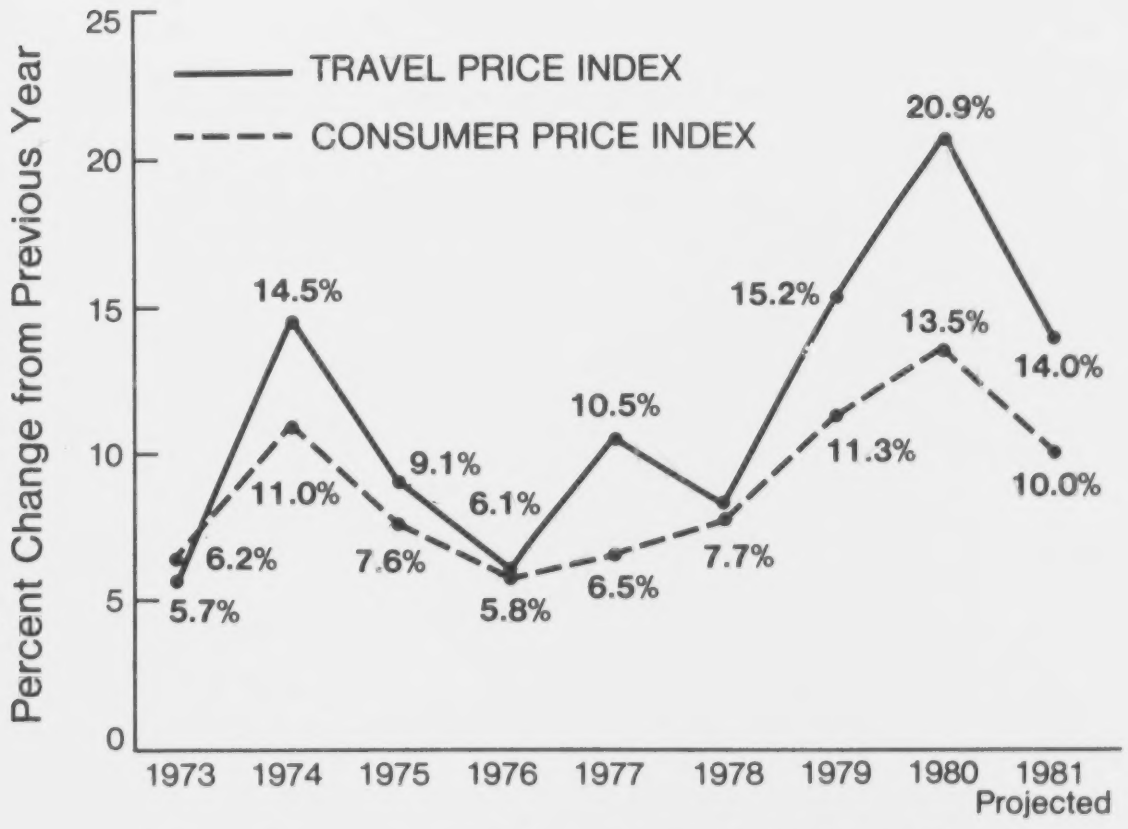
SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 2C.*

III. TRAVEL PRICE INFLATION

Travel away from home in the U.S. is heavily dependent on petroleum fuels. It is no surprise, then, that the cost of travel rises almost as fast as gasoline and other transportation fuel prices.

Figure 3A illustrates how the travel prices, represented by the Data Center's Travel Price Index, has surpassed the Consumer Price Index in growth for each year sine 1973. The Travel Price Index measures the change in the cost of travel away from home in the U.S. In 1974, travel prices rose 40 percent faster than consumer prices as gasoline costs soared 35 percent. This scenario was repeated in 1979 (gas prices up 35 percent) and 1980 (gas prices up 39 percent).

FIGURE 3A
1980 TRAVEL PRICE INFLATION BROKE RECORDS



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 3A.*

Airlines have been forced to raise their fares in recent years as their fuel costs have skyrocketed. In 1980 alone, the cost of fuel to U.S. carriers in domestic service rose 53 percent over 1979, boosting fares 38 percent.

Travel prices rose nearly 21 percent in 1980, the largest increase in the 12 years for which we have complete travel price data. Since 1972, travel prices have increased 130 percent, for a compound annual rate of 11 percent. This is 25 percent faster than the Consumer Price Index rose over this period.

As indicated in Figure 3B, gasoline led all other components of the Travel Price Index (TPI) in growth since 1972. Indeed, if gasoline prices had remained stable, the TPI would be up less than 90 percent during this period, slower than the change in consumer prices. It is hard to exaggerate the influence of petroleum fuel prices on travel costs in the last decade.

Fortunately, relief is in sight. During first-half 1981, gasoline prices actually fell. A glut of crude oil supplies in world markets is expected to keep petroleum prices from rising throughout the year. Consequently, a rosier forecast for travel prices in 1981 seems realistic, as indicated in Table III-A. Indeed, the rate of increase in the Travel Price Index is projected to be one-third lower than in 1980 but still above the trend rate of growth.

Table III-A Travel price Inflation, 1972-1981 projected. (annual compound percent change)

Component	1972-1979	1980	Projected 1981
Food	9%	10%	9%
Lodging	9	14	12
Gasoline	14	39	15
Intercity rail	8	18	15
Airline fares	7	38	30
Intercity bus	9	14	11
Entertainment	6	7	8
Incidentals	6	9	8
Travel Price Index	10%	21%	14%

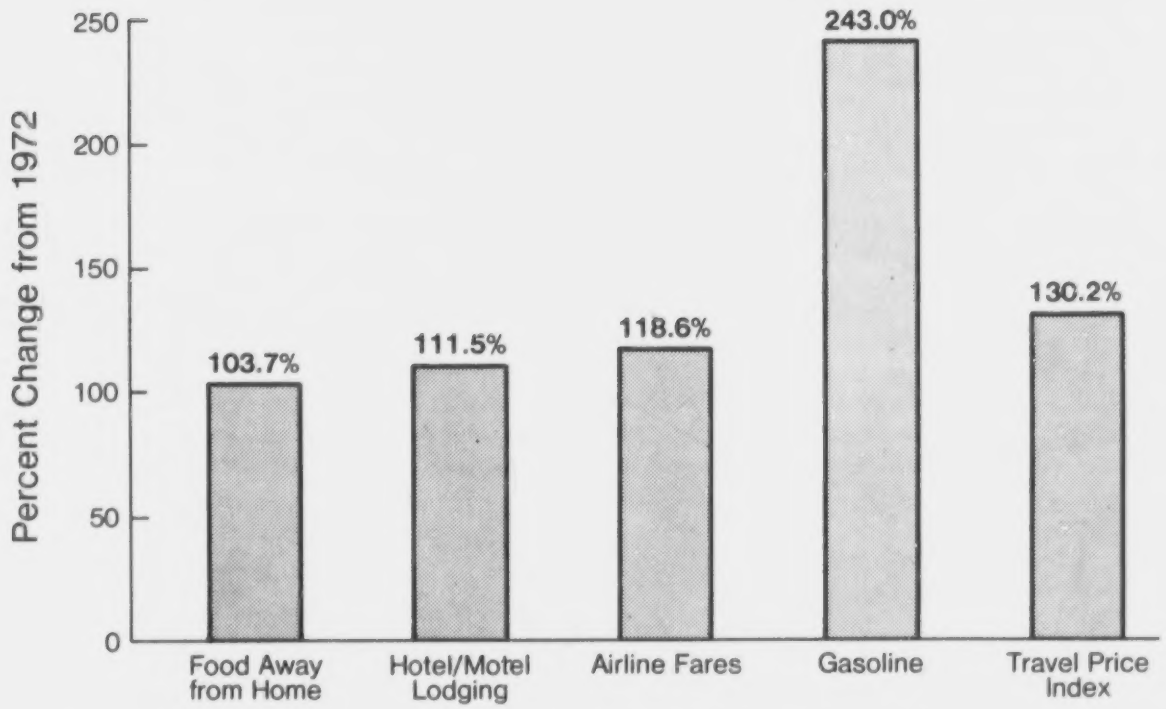
Source: U.S. Travel Data Center, based on U.S. Bureau of Labor Statistics data.

Also indicated in Figure 3B, other travel prices have risen as well. All components shown grew faster than the Consumer Price Index over this period (up 97 percent).

Consumers continually alter their choices in response to relative price inflation among the items they buy and changes in their incomes. If travel costs rise faster than other consumer items, and faster than their budgets, they will eventually be forced to cut back on travel. The changes in real industry receipts discussed in Chapter II suggest travel demand rises slowly when travel prices soar.

The industry would do well to evaluate their pricing policies and look to innovative ways to increase efficiency and keep costs from rising rapidly. It should also encourage public policies that will reduce inflation and expand real growth of the U.S. economy.

FIGURE 3B
GASOLINE HAS LED TRAVEL PRICE SURGE SINCE 1972



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 3A.*

IV. TRAVEL AS AN ENGINE OF EMPLOYMENT

As discussed in Chapter II, travel away from home in the U.S. is a major economic activity which directly generated 4.3 million jobs, nearly five percent of total employment in 1980.

The travel industry is outperforming the overall U.S. economy in creating job opportunities. Since 1958, the earliest year for which data are available, payroll jobs in travel-related business establishments have increased 184 percent (Figure 4A). This more than twice as fast as the growth in total U.S. payroll employment over this period.

The travel industry contributed more than ten percent of the 39 million new jobs created over these two decades. Its share of total non-agricultural payroll employment rose from 4.3 percent in 1958 to nearly 7 percent in 1980. There are few sectors of the U.S. economy that can boast of such a record.

Figure 4A also indicates that while total U.S. employment actually fell for the years 1961 and 1975, the travel industry consistently produced more jobs every year than the year before. The counter-recessionary nature of travel industry employment is highlighted in Figure 4B.

The 1980 economic recession began in January. By July, the economy had reached its trough, and U.S. payroll employment was down nearly 200 thousand jobs from the previous year. Travel industry employment, on the other hand, was more than 300 thousand jobs above its year-earlier level at this point. The industry contributed 35 percent of the new jobs created in 1980.

The travel industry has shown similar counter-recessionary employment behavior in previous recessions, continuing to create more jobs even while total employment in the economy declines.

Minority groups and women have generally registered higher unemployment rates than the overall average for all U.S. workers. These Americans have traditionally found it more difficult than others to find jobs.

Table IV-1: Minority Group and Female Share of Employment, 1980

Group	Employment share in the travel industry	Employment share in all U.S. industries
Minority	12.0%	11.2%
Women	54.0	42.4

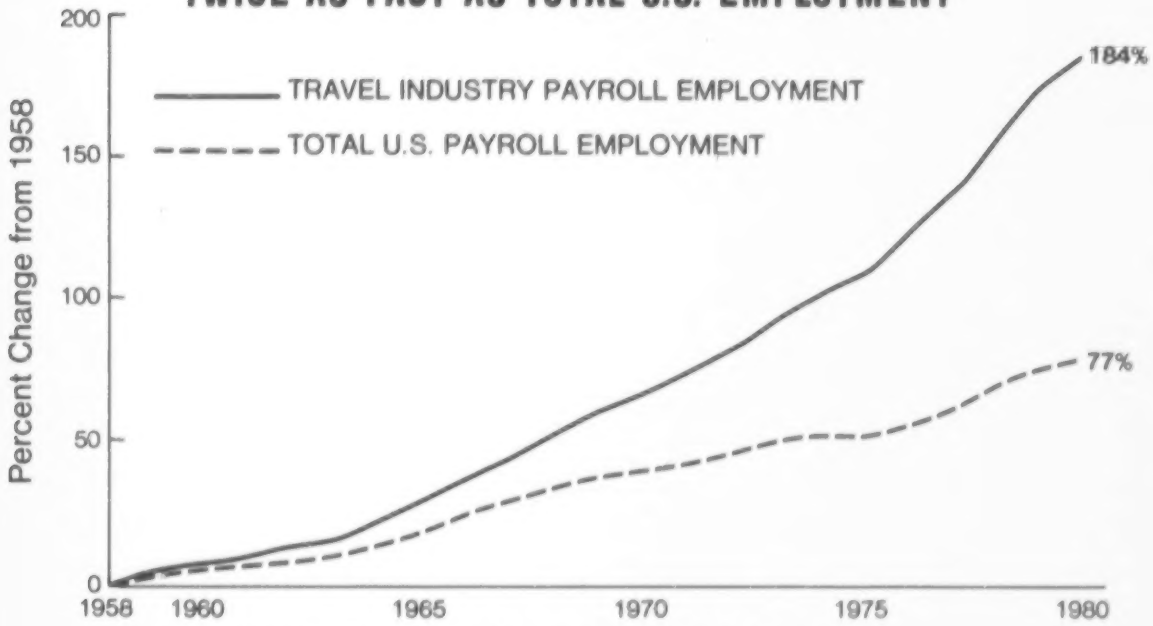
Source: U.S. Travel Data Center, Based on data from the U.S. Bureau of Labor Statistics.

The travel industry has proved itself to be a dependable source of abundant job opportunities. As indicated in Table IV-1, blacks and other minority groups account for twelve percent of all jobs in the travel industry, including air transportation, eating and

drinking places, hotels and motels, and entertainment and recreation services. Women hold 54 percent of travel industry jobs, a far higher percentage than in the overall economy.

The nation has long recognized that providing job opportunities for its citizens is its top economic priority. Public officials and others charged with reducing unemployment would do well to investigate the extraordinary job-creation powers of travel and the travel industry and develop efficient ways to enhance and encourage this unique ability.

FIGURE 4A
TRAVEL INDUSTRY EMPLOYMENT HAS GROWN TWICE AS FACT AS TOTAL U.S. EMPLOYMENT



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 4A.*

FIGURE 4B
THE TRAVEL INDUSTRY EXCELLED IN CREATING NEW JOBS IN 1980

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 4B.*

V. TRAVEL AND ENERGY

Transportation is essential for U.S. travel away from home. U.S. transportation requires petroleum fuels as 97 percent of the energy it consumes. Yet travel/tourism transportation accounts for only a small share of the nation's petroleum and energy consumption.

As Figure 5A indicates, travel by all modes of transportation accounted for only 9 percent of total petroleum consumed in 1980. Automobiles and other personal motor vehicles consumed nearly one-half of the 560 million barrels of oil used in this activity. Air transportation, including general aviation and certificated air carriers in domestic passenger service, was the next largest consumer.

All modes taken together required less than one-half of the petroleum fuel that local automobile travel did. In other words, Americans could cut back on commuting, shopping and other local use of passenger vehicles by one-third and save the same amount of petroleum as would eliminating travel and tourism altogether.

Total U.S. petroleum consumption fell nearly 8 percent in 1980. Travel/tourism consumption declined one-third as much. Local auto travel petroleum consumption also dropped, but not as much as for travel and tourism (Table 5A in Appendix A).

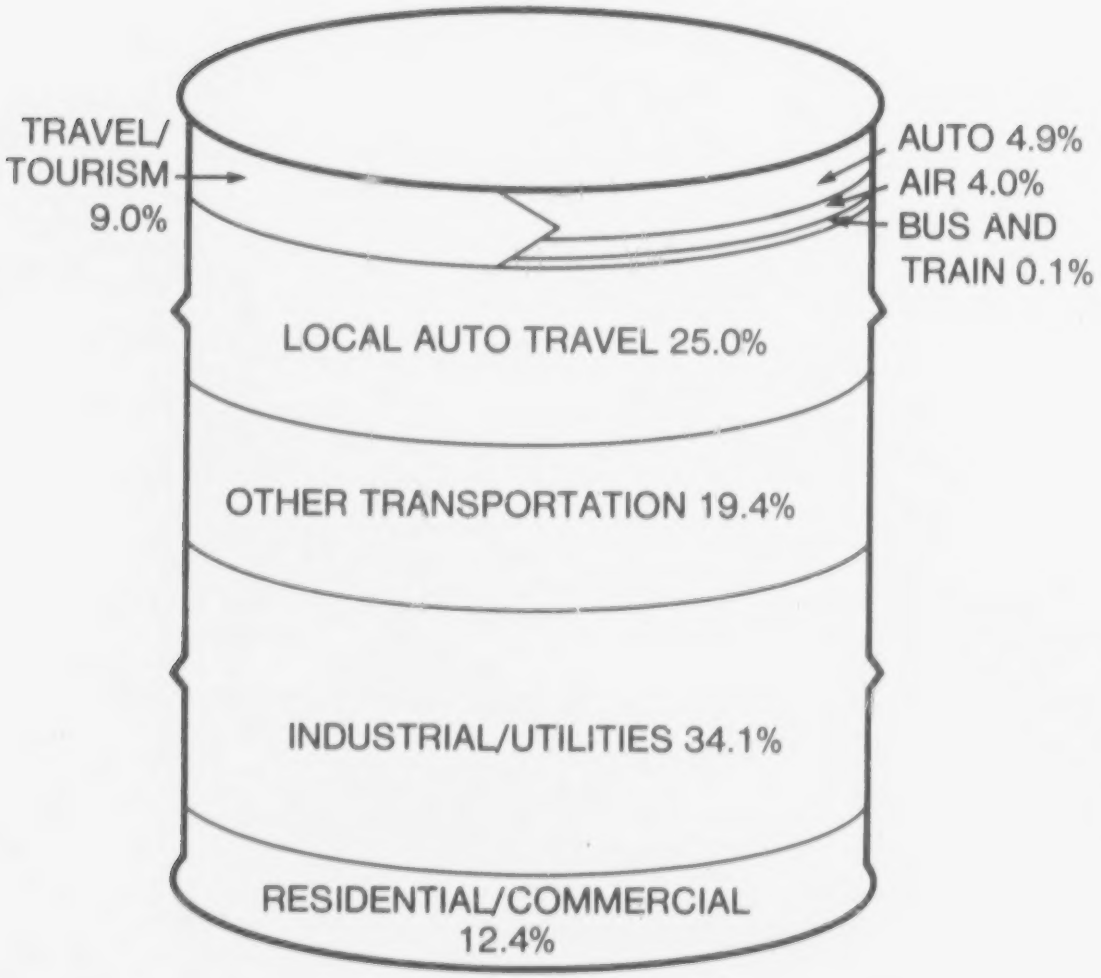
All forms of transportation comprised 53 percent of total domestic petroleum consumption in 1980. Motor gasoline consumption, down 6.5 percent for the year, accounted for 39 percent of the total.

As Figure 5B shows, travel and tourism transportation contributed only four percent of total energy consumption in 1980. This is considerably less than other major sectors.

Travel and the industry that serves it needs adequate petroleum fuel supplies to survive, yet requires very little of our annual consumption. Every barrel consumed permits $279 in travel and tourism spending in the U.S. There is one travel-generated job for every 15 gallons a day consumed by travelers in America.

In short, we devote a small amount of our energy to insure that we continue to enjoy the quality of life and the considerable income, employment and tax revenue travel and tourism in America.

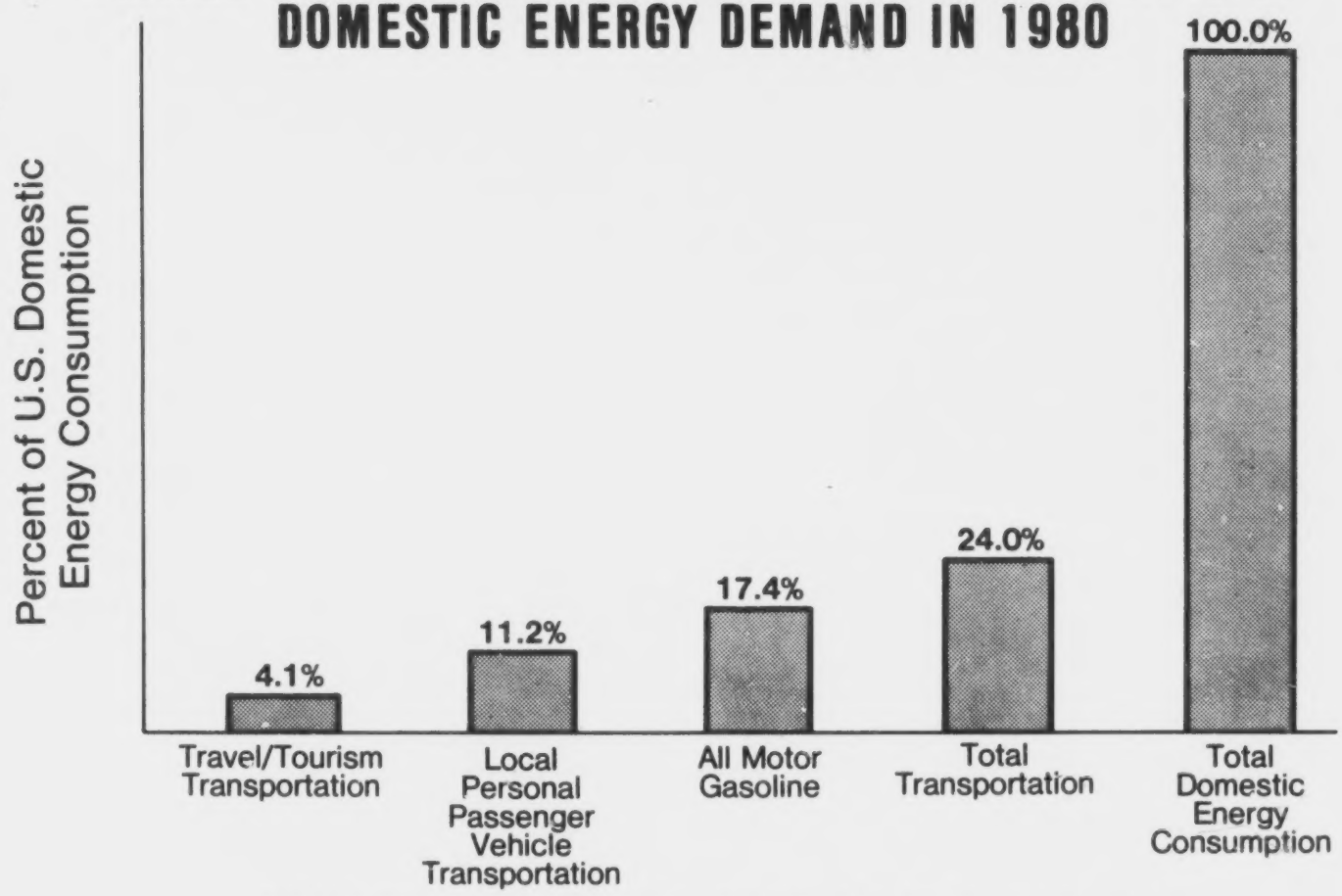
FIGURE 5A
TRAVEL AND TOURISM ACCOUNT FOR ONLY 9% OF DOMESTIC PETROLEUM CONSUMPTION



U.S. Consumption of Petroleum in 1980 was 6,224.2 Million Barrels.

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 5A.*

FIGURE 5B
TRAVEL AWAY FROM HOME COMPRISED ONLY 4.1% OF DOMESTIC ENERGY DEMAND IN 1980



SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 5B.*

VI. INTERNATIONAL TRAVEL TRENDS

The U.S. passed several international travel milestones in 1980. For one, Canadian visitors to the U.S. outnumbered U.S. travelers to Canada for the first time. For another, Mexico replaced Canada as the leading source of foreign visitor spending in the U.S. The United Kingdom replaced Japan as the major overseas source of foreign visitors. (Overseas countries are all foreign countries except Canada and Mexico.) Finally, foreign visitors to the U.S. outnumbered U.S. travelers to foreign countries for the first time since 1945.

The number of foreign visitors to the U.S. topped 22 million in 1980, nearly 11 percent more than the previous years (Table VI-1). Canada accounted for over 50 percent of all visitors, but Mexico and Venezuela posted the highest growth rates.

Table VI-1: Foreign Visitors and Expenditures in the U. S., by Selected Country of Origin, 1980 (millions)

	Visitors		Visitor expenditures	
Country of Origin	Millions	Variation from 1979	$ millions	Variation from 1979
Canada	11.385	+ 6.2%	$2,428	+16.1%
Mexico	3.200	+24.5	2,554	+36.7
United Kingdom	1.130	+21.5	469	+25.1
Japan	1.125	+ 3.3	774	+10.7
West Germany	0.680	+11.8	500	+13.6
Venezuela	0.465	+26.4	370	+ 8.8
France	0.320	+ 5.6	216	+20.0
Total U. S.	22.500	+10.7%	$10,090	+21.1%

Source: U.S. Travel Service; Bureau of Economic Analysis, U.S. Department of Commerce, Survey of Current Business, Vol. 61, No. 5 (May, 1981).

Expenditures by foreign visitors in the U.S. (excluding international transportation costs) soared 21 percent, well above the 1972-79 trend rate of 17 percent per year. Mexican visitors' spending rose nearly 40 percent, and accounted for more than one-quarter of the $10 billion total from foreign visitors in 1980. This is remarkable in light of the fact that Mexican visitors comprised only 14 percent of our foreign guests.

It is evident that Mexican visitors spend large amounts while here. In Table VI-2, the average spending per visitor is shown by country according to number of visitors in descending order. Mexican visitors spend more per capita than any of the top six nations of origin.

Table VI-2: Average Expenditure in the U.S. per Visitor from Selected Countries, 1980

Origin Country	Average
Canada	$213
Mexico	798
United Kingdom	415
Japan	688
West Germany	735
Venezuela	796
France	675
All countries	$448

Source: U.S. Travel Data Center, Table VI-1.

The number of U.S. travelers for foreign countries dropped more than 2 percent in 1980, as indicated in Table VI-3. Canada remained the number one U.S. foreign destination, garnering half of the total. Among the top seven destination countries, only the Bahamas and Italy, the two smallest in terms of U.S. visitors, showed any gains over 1979. Travel to West Germany declined nearly 9 percent.

Table VI-3: U. S. Travelers and Expenditures in Selected Foreign Countries, 1980 (millions)

	U.S. Travelers		U.S. expenditures	
Country Visited	Millions	Variation from 1979	$ millions	Variation from 1979
Canada	11.171	-0.9%	$ 1,817	+13.6%
Mexico	3.087	-1.0	2,564	+ 4.2
United Kingdom	1.580	-2.3	903	+ 9.3
France	0.888	-5.8	383	+ 7.9
West Germany	0.787	-8.9	322	+13.8
Bahamas	0.755	+8.0	262	+17.0
Italy	0.749	+4.3	360	+20.0
Total U.S.	22.365	-2.3%	$10,397	+10.5%

Note: excludes cruise travel.
Source: U.S. Travel Service; Bureau of Economic Analysis, U. S. Department of Commerce, Survey of Current Business, Vol. 61, No. 5 (May, 1981).

U.S. spending in foreign countries, disregarding international transportation costs, increased less than 11 percent, the smallest increase since 1977. The Bahamas and Italy showed the greatest gains, while U.S. travel spending in West Germany was surprisingly strong given the decline in U.S. visitors.

The average U.S. visitor to West Germany in 1980 spent 25 per-percent more than the year before. Table VI-4 shows the averages for the seven most popular U.S. destinaocuntries, in descending order. Mexico enjoyed by far the highest average, 80 percent more than the average for all countries. Canada showed the lowest average U.S. visitor spending.

Table VI-4: Average Expenditure per U.S. Traveler in Selected Foreign Countries, 1980

Country visited	Average
Canada	$163
Mexico	831
United Kingdom	572
France	431
West Germany	409
Bahamas	347
Italy	481
All countries	$465

Source: U.S. Travel Data Center, Table VI-3.

Mexico also garnered the lion's share of total U.S. spending in foreign countries during 1980: nearly one-quarter of the total. However, the rate of growth over 1979 was the smallest among the top destniations shown.

For the first time since World War, II the U.S. received more foreign visitors than it sent to foreign countries in 1980. As Figure 6A shows, we very nearly closed the spending a gap as well.

The difference of receipts from foreign travelers in this country less U.S. spending in foreign countries has persisted throughout the postwar period. However, this deficit reached a peak in 1973 and, but for a brief rise in 1977, has been declining ever since. In 1981, the U.S. Travel Service projects we will be in balance on this account.

We also have a payments account for international passenger fares. This is simply the amount U.S. carriers earn from foreign nationals less what U.S. citizens spend for traveling on foreign carriers. Progress here has been discouraging (Figure 6B).

The deficit on the international passenger fare account has proved quite stubborn over the years. The loss in 1980 was considerably higher than in 1972. We appear to have stalled at the $1.5 billion deficit level for this account.

To eliminate this international deficit requires redoubled efforts to improve the ability of U.S. carriers to compete with

FIGURE 6A
THE INTERNATIONAL TRAVEL SPENDING GAP NEARLY CLOSED IN 1981

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 6A.*

FIGURE 6B
U.S. INTERNATIONAL PASSENGER FARE DEFICIT HAS NOT IMPROVED

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 6B.*

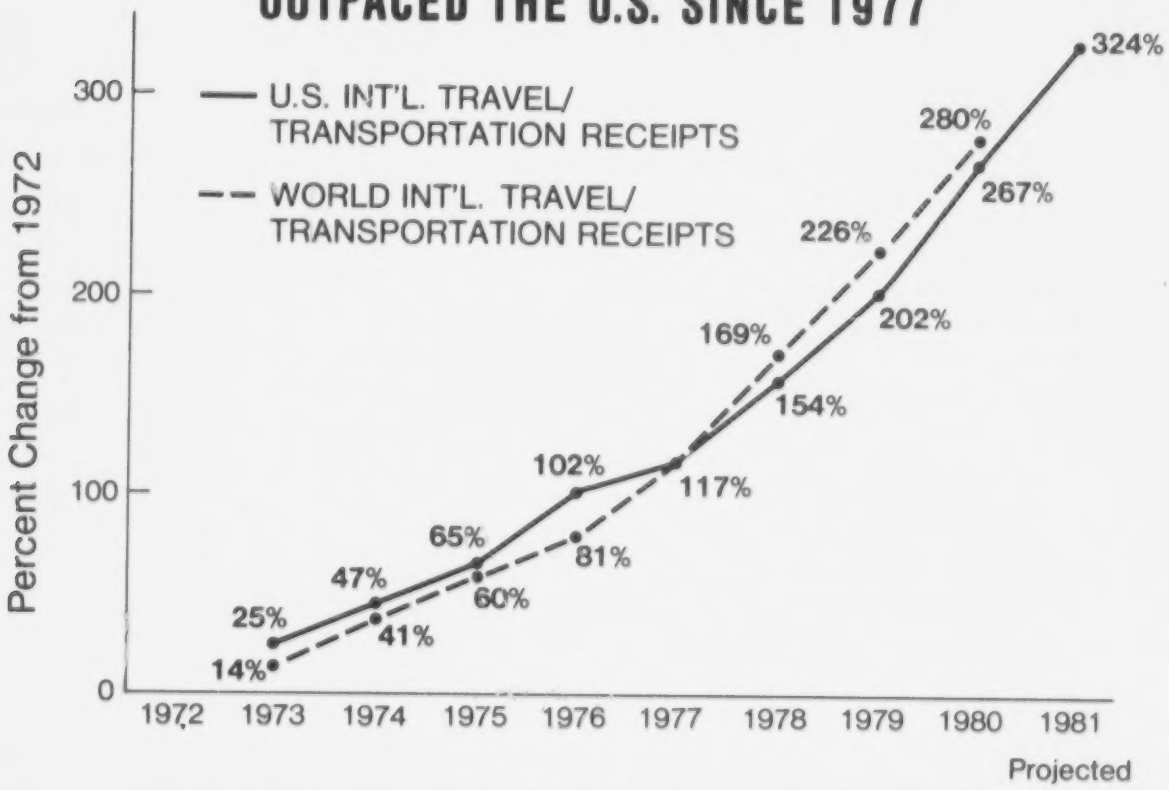
foreign carriers. The industry and public officials should recognize that impediments to U.S. carrier growth occasionally imposed by foreign governments are a major reason for the persistence of the international passenger fare deficit.

While foreign visitors and their expenditures in the U.S. have grown dramatically in recent years, this is not a cause for complacency. U.S. international travel and passenger transportation receipts have grown at a compound annual rate a full percentage point below world receipts since 1972 (Figure 6C).

Until 1977, the U.S. grew faster than the world in travel and tourism earnings and accounted for 15 percent of the world's total in 1976. Since then, we have fallen behind, garnering only 13 percent in 1980.

This is at least partially attributable to the reduction in federal government resources devoted to international travel marketing since 1977. Other national governments have recognized they have a vital and legitimate role to play in promoting inbound travel and tourism. The U.S. would do well to realize that we may continue to lose our share of the international travel market if we do not accept this reality.

FIGURE 6C
WORLD INTERNATIONAL TOURISM RECEIPTS HAVE OUTPACED THE U.S. SINCE 1977

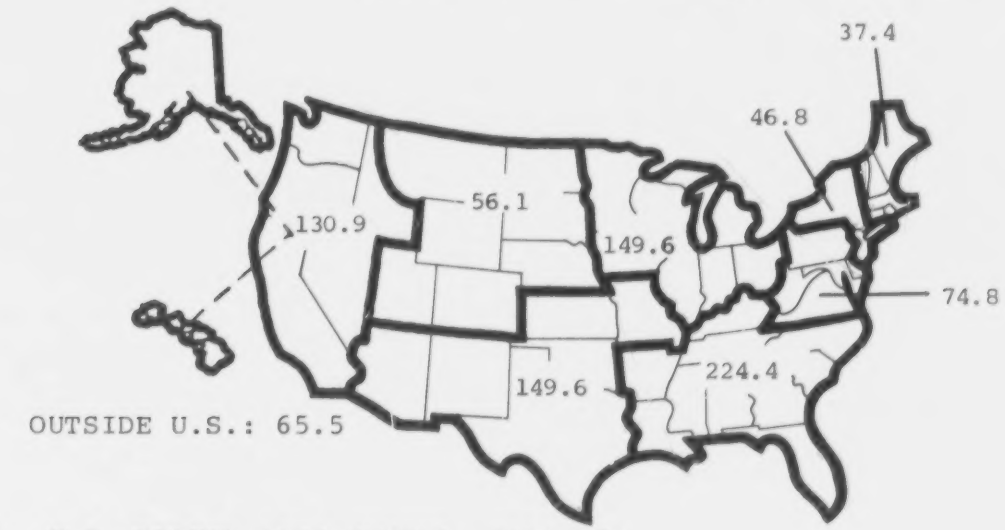


SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 6C.*

VII. REGIONAL TRAVEL PATTERNS

Americans travel all over their country. Figure 7A shows the number of U.S. travelers to each of the eight Discover America Travel Regions and foreign destinations in 1980.

FIGURE 7A: U.S. RESIDENT TRAVEL BY DESTINATION REGION, 1980
(PERSON-TRIPS, MILLIONS)



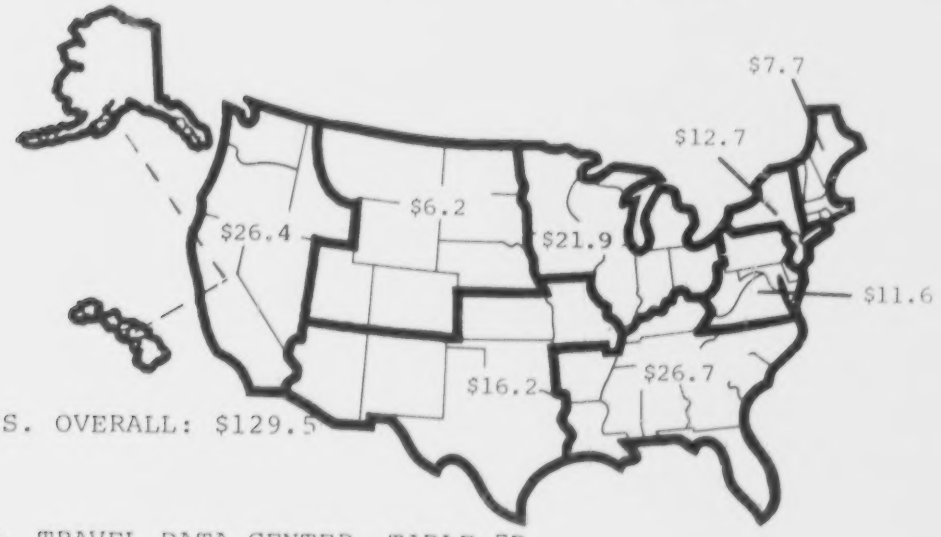
SOURCE: U.S. TRAVEL DATA CENTER, TABLE 7A

Of all the regions, The South includes the largest number of states. It is also the most popular among travelers, garnering almost one-quarter of all U.S. trips in 1980. U.S. travelers spent more than one million nights in this region during that year (Table 7A in Appendix A).

New England received the fewest U.S. travelers among the regions. However, travelers spent an average of more than five nights per trip to the region, compared to 4.6 nights for all U.S. trips. This average was exceeded only by trips to the Far West (5.6 nights per trip) and foreign destinations (8.2 nights).

Total travel expenditures in a region depend on the number of travelers, the number of days they spend on their trips, and their spending habits. As Figure 7B shows, the South and Far West each received one-fifth of the $130 billion travel expenditures in the U.S. by residents and foreign visitors during 1978. This is the most recent year for which data are available.

FIGURE 7B: TOTAL TRAVEL EXPENDITURES BY U.S. AND FOREIGN VISITORS, BY TRAVEL REGION, 1978 ($ BILLIONS)



SOURCE: U.S. TRAVEL DATA CENTER, TABLE 7B

The South clearly led in U.S. travel expenditures for the year, but the Far West topped all in the $2.7 billion spent by foreign visitors (see Table 7B in Appendix A). Although New England was last in attracting U.S. travelers, it surpassed the Mountain West region in total travel expenditures.

The economic benefits of travel and tourism in the U.S. are far-reaching. The U.S. Travel Data Center has conducted studies of the travel expenditures and the employment, payroll and tax revenue generated by them in nearly 1,300 different counties in the U.S. since 1978. In only two of these counties was it determined that travel made no measurable economic contribution. There are few industries in the nation that can boast of such widespread benefits.

One of the most important benefits of travel and tourism is the employment this activity supports. Table VII-1 shows the number of jobs directly generated by U.S. and foreign visitor travel expenditures during 1978, the most recent year available.

The South leads the other seven regions with nearly one million travel-generated jobs. Travel and tourism provide nearly six percent of all payroll jobs in the region.

Of all regions, however, the Mountain West, is the most dependent on travel for employment opportunities. One out of every thirteen payroll jobs in this region is attributable to traveler spending.

Table VII-1: Employment Generated by U.S. and Foreign Travel Expenditures, by Travel Region, 1978

TRAVEL REGION	Travel-generated employment (thousands)	Share of total payroll employment (percent)
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	266	5.1%
Eastern Gateway: New Jersey, New York	382	3.8
G. Washington Country: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia	378	3.8
South: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississipi, North Carolina, South Carolina, Tennessee	931	5.8
Great Lakes: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin	757	3.9
Mountain West: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming	249	7.7
Frontier West: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas	551	5.2
Far West: Alaska, California, Idaho, Nevada, Oregon, Washington, Hawaii	827	6.4
U.S. Overall	4,376	5.0%

Note: Details may not add to totals due to rounding.
Source: U.S. Travel Data Center's Travel Economic Impact Model, includes overnight trips and day-trips to places 100 miles or more away from home.

The major industrial regions of the U.S., the Eastern Gatway, George Washington Country, and Great Lakes Country, show the least dependence on travel for employment. However, even these regions have a significant stake in travel and tourism for providing job opportunities.

Travel can be a powerful force for economic development, particularly in certain regions of America. By the same token, these regions would suffer disproportionate economic loss should policies be adopted that inhibit or discourage the healthy growth of travel and tourism in America.

VIII. CONCLUSION

Travel away from home is a widespread American activity. People from all walks of life, during all seasons of the year, travel to destinations all over the country. They travel on business, for pleasure, and to attend to personal affairs.

While traveling away from home, Americans purchase transportation, gasoline, lodging, food, entertainment, recreation, and a myriad of incidental items. In so doing, they begin an economic chain that provides businesses with receipts, employees with income, and governments with tax revenue.

The industry that serves the traveler is diverse and inconspicous. It is not concentrated in a single region of the country nor is it characterized by large plants with towering smokestacks. Rather, the travel industry operates in every state, city and town in the nation. It comprises the airline terminal, the highway motel, the travel agent down the block, and a host of businesses that do not recognize their dependence on travelers because they are indistiguishable from other customers.

So despite its being the third largest retail or service industry in the country, the travel industry is often overlooked when governments form economic policies, or allocate energy, or alter regulations. It is often overlooked when citizens vote on tax and zoning referenda. It is often overlooked when investors search for projects with growth potential.

By this disregard, we as a nation run the risk of denying millions of Americans the opportunity to travel for recreation or to earn a living. We also run the risk of damaging an industry that has demonstated an extraordinary ability to create jobs, through good times and bad, for the very people who need jobs the most. Our neglect of travel and the travel industry could worsen our balance of payments as well and choke off the growing flow of foreign visitors with the international exchange that helps keep our inflation down.

The last decade has demonstrated the power of travel to provide economic benefits and its vulnerability to serve inflation and economic recession. Policies that encourage stable prices and a growing economy will help the industry provide the kind of travel experience Americans demand.

But most of all, the industry is vulnerable to petroleum shortages. Although its energy requirements are insignificant compared to other sectors, travel away from home must have adequate petroleum fuel supplies to survive. Policies that restrict the travel industry's access to petroleum in a discriminatory manner can needlessly throw thousands out of work, rob governments of millions in tax revenue, and disproportionately depress many regions of our country.

The first step toward assuring that travel and the travel industry are permitted to provide the jobs, income and quality of life Americans deserve is to understand the role of travel in the U.S. economy. We hope these pages contribute to growth of this understanding.

APPENDIX A: BASIC TRAVEL DATA

Table 2A: Business Receipts of Selected U.S. Travel Industry Sectors, 1972-1981 Projected

($ billions)

Sector	1972	1973	1974	1975	1976	1977	1978	1979	1980	Projected 1981
Transportation										
Air	$ 7.686	$ 8.518	$ 9.903	$ 10.301	$ 12.104	$ 13.773	$ 15.753	$ 18.931	$ 23.302	$ 28.200
Bus	.974	1.023	1.152	1.172	1.232	1.331	1.420	1.655	1.947	2.200
Rail	.163	.202	.257	.253	.287	.310	.321	.398	.427[1]	.520
Lodging										
Hotel, motels	10.027	10.955	11.757	13.002	15.129	16.413	19.443	22.226	23.638	25.100
Food Service										
Eating and drinking places	36.180	40.402	44.673	51.067	57.211	63.276	69.145	75.139	86.481	95.100
Entertainment/Recreation										
Amusement and recreation services	13.378	14.120	16.695	18.047	20.748	22.803	23.224	25.750	28.327	32.300
Travel industry	$ 68.408	$ 75.220	$ 84.437	$ 93.842	$106.711	$117.906	$129.306	$144.099	$164.122	$183.420
Gross national product	$1,185.9	$1,326.4	$1,434.2	$1,549.2	$1,718.0	$1,918.0	$2,156.1	$2,413.9	$2,626.1	$2,942.2

Source: U. S. Travel Data Center, based on data from the Civil Aeronautics Board, American Bus Association, Amtrak, U. S. Bureau of Economic Analysis, U. S. Department of Commerce, U. S. Bureau of the Census.

[1] FY 80 October 1 - September 30.

Table 2B: Business Receipts of Selected U.S. Travel Industry Sectors in 1972 Dollars, 1972-1981 Projected

($ billions)

Sector	1972	1973	1974	1975	1976	1977	1978	1979	1980	Projected 1981
Transportation										
Air	$ 7.686	$ 8.230	$ 8.434	$ 8.581	$ 9.551	$ 10.298	$11.850	$13.420	$12.819	$ 12.400
Bus	.974	1.016	1.066	.978	.966	.989	.978	1.047	1.066	1.100
Rail	.163	.206	.234	.212	.234	.228	.228	.266	.250	.260
Lodging										
Hotels, motels	10.027	10.504	10.478	10.797	11.611	11.647	12.130	11.999	11.175	10.600
Food Service										
Eating and drinking places	36.180	37.459	36.742	38.410	40.303	41.415	41.506	40.555	42.463	42.900
Entertainment/Recreation										
Amusement and Recreation services	13.378	12.931	15.289	15.529	17.141	16.703	16.988	17.610	18.028	19.000
Travel industry	68.408	70.346	72.243	74.507	79.806	81.280	83.680	84.897	85.801	86.260
Gross national product	$1,185.9	$1,255.0	$1,248.0	$1,233.9	$1,300.4	$1,371.7	$1,436.9	$1,483.0	$1,480.7	$1,518.0

Source: U.S. Travel Data Center, based on data from the Civil Aeronautics Board, American Bus Association, Amtrak, U.S. Bureau of the Census, the U.S. Bureau of Labor Statistics, and the U.S. Bureau of Economic Analysis.

Table 2C: U.S. Domestic Intercity Transportation Activity, 1972-1981 Projected

(billions of passenger-miles)

Mode	1972	1973	1974	1975	1976	1977	1978	1979	1980	Projected 1981
Common carriers										
Certificated air	121.8	130.5	133.7	136.0	151.4	163.2	187.8	212.7	203.2	197.1
Bus	25.6	26.4	27.7	25.4	25.1	25.7	25.4	27.2	27.7	28.5
Amtrak	3.0	3.8	4.3	3.9	4.3	4.2	4.2	4.9	4.6	4.8
Total	150.4	160.7	165.7	165.3	180.8	193.1	217.4	244.8	235.5	230.4
Auto/truck/RV	987.9	1,017.4	981.7	1,024.4	1,102.1	1,151.6	1,192.1	1,166.5	1,137.9	1,183.0
Total All Modes	1,138.3	1,178.0	1,147.3	1,189.7	1,282.9	1,344.7	1,409.5	1,411.3	1,373.4	1,413.8

Source: U.S. Travel Data Center, based on data from the Civil Aeronautics Board, American Bus Association, Amtrak, and the Federal Highway Administration.

Note: Details may not add to totals due to rounding.

Table 3A: Travel Price Index and Its Components, 1972-1981 Projected

(1967 = 100)

Component	1972	1973	1974	1975	1976	1977*	1978	1979	1980	Projected 1981
Transportation										
Airline fares	130.3	134.7	145.9	159.0	172.2	182.0	190.6	205.8	284.8	370.0
Bus fares	140.1	145.7	161.0	186.0	196.9	223.5	240.2	260.0	297.1	319.0
Rail fares	124.5	122.8	135.2	151.5	165.3	180.6	194.6	212.4	250.1	288.0
Gasoline	107.6	118.1	159.9	170.8	177.9	188.2	196.3	265.6	369.1	424.0
Lodging										
Hotel/motel	132.7	138.4	148.9	159.8	172.9	187.0	212.7	245.8	280.7	314.0
Food Service										
Food away from home	131.1	141.4	159.4	174.3	186.1	200.3	218.4	242.9	267.0	291.0
Entertainment/Recreation										
Recreation services	128.3	132.3	140.1	149.1	155.3	166.2	175.4	187.6	201.6	218.0
Incidentals	115.1	118.0	125.6	132.9	137.4	161.5	168.7	178.0	193.3	209.0
Travel Price Index	123.0	130.0	148.9	160.2	169.9	187.8	203.3	234.3	283.2	323.0
Consumer Price Index	125.3	133.1	147.7	161.2	170.5	181.5	195.4	217.4	246.8	271.0

*Consumer Price Index revised beginning with 1977; data for 1977 and subsequent years are not strictly comparable with earlier years.

Source: U.S. Travel Data Center, based on U.S. Bureau of Labor Statistics data.

Table 4A: Payroll Employment for Selected Travel Industry Sectors, 1958-1980

(thousands)

Sector	1958	1959	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969
Intercity highway passenger transportation	43.0	41.4	40.5	40.9	41.3	40.8	42.1	41.8	41.9	43.8	43.2	43.2
Air transportation	165.2	179.3	191.2	195.7	196.9	201.7	212.6	229.0	248.3	298.2	329.2	352.9
Eating and drinking places	1,528.9	1,602.9	1,654.3	1,664.8	1,720.5	1,747.9	1,848.1	1,987.9	2,117.9	2,191.4	2,308.8	2,465.7
Hotels, motels and tourist courts	492.8	511.7	530.8	543.9	559.2	566.6	592.6	609.6	638.8	653.4	676.8	703.2
Travel industry	2,229.9	2,335.3	2,416.8	2,445.3	2,517.9	2,557.0	2,695.4	2,868.3	3,046.9	3,186.8	3,358.0	3,565.0
Total U.S.	51,324	53,268	54,189	53,999	55,549	56,653	58,283	60,765	63,901	65,803	67,897	70,384

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment and Earnings, United States, 1909-78, (July, 1979), Supplement to Employment and Earnings, Revised Establishment Data (Jan., 1977-Mar., 1980) (September, 1980), Employment and Earnings (March, 1981).

Table 4A: Payroll Employment for Selected Travel Industry Sectors, 1958-1980 (Continued)

(thousands)

Sector	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
Intercity highway passenger transportation	43.4	43.5	42.0	41.3	42.4	39.9	39.6	37.4	36.1	37.4	40.8
Air transportation	351.7	344.6	348.3	365.7	367.8	362.8	373.8	386.3	407.9	437.0	451.4
Eating and drinking places	2,575.6	2,700.4	2,860.2	3,053.8	3,231.2	3,379.5	3,656.2	3,948.6	4,277.2	4,580.4	4,818.2
Hotels, motels and tourist courts	717.4	737.6	774.9	807.7	823.5	849.5	885.2	913.0	945.6	1,012.4	1,027.7
Travel industry	3,688.1	3,826.1	4,025.4	4,268.5	4,464.9	4,631.7	4,954.8	5,285.3	5,666.8	6,067.2	6,338.1
Total U.S.	70,880	71,214	73,675	76,790	78,265	76,945	79,382	82,471	86,697	89,886	90,657

Table 4B: Payroll Employment for Selected Travel Industry Sectors, 1980 Monthly

(thousands)

Sector	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Intercity highway passenger transportation	38.5	37.7	37.9	39.4	40.5	41.9	43.3	44.6	43.3	40.9	40.5	41.3
Air transportation	453.4	452.7	447.9	452.9	455.1	453.8	455.0	456.4	449.0	446.6	443.5	446.6
Eating and drinking places	4,502.3	4,533.4	4,604.1	4,779.1	4,898.5	4,944.9	4,944.9	4,984.1	5,005.7	4,893.1	4,872.5	4,855.5
Hotels, motels and tourist courts	938.6	948.5	979.9	1,024.7	1,054.5	1,090.6	1,118.8	1,122.7	1,084.4	1,024.4	981.8	962.9
Amusement and recreation services	611.3	625.4	677.7	724.7	784.7	842.2	854.2	850.4	792.3	708.7	668.8	677.0
Travel industry	6,544.1	6,597.7	6,747.5	7,020.8	7,233.3	7,373.4	7,416.2	7,458.2	7,374.7	7,113.7	7,007.1	6,983.3
Total U.S.	89,630	89,781	90,316	90,761	90,849	91,049	89,820	90,072	90,729	91,332	91,693	91,846

Source: U.S. Department of Labor, Bureau of Labor Statistics, Supplement to Employment and Earnings, Revised Establishment Data (Jan., 1977-Mar., 1980) (September, 1980), Employment and Earnings (March, 1981).

Table 4C: Payroll Employment for Selected Travel Industry Sectors, 1979 Monthly

(thousands)

Sector	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Intercity highway passenger transportation	35.5	34.2	34.4	35.4	36.5	37.8	39.5	40.3	39.7	38.3	38.2	39.1
Air transportation	427.0	430.4	434.7	402.6	408.8	443.9	444.9	449.8	448.8	448.0	450.6	453.9
Eating and drinking places	4,206.5	4,237.3	4,346.4	4,534.6	4,647.0	4,706.2	4,715.6	4,759.0	4,792.8	4,684.5	4,665.7	4,669.1
Hotels, motels and tourist courts	931.4	944.8	977.6	1,008.4	1,035.9	1,071.9	1,094.7	1,092.5	1,052.7	1,006.3	976.1	956.0
Amusement and recreation services	618.3	633.2	664.7	715.4	755.4	802.4	804.0	794.4	740.4	667.3	630.2	633.9
Travel industry	6,218.7	6,279.9	6,457.8	6,696.4	6,883.6	7,062.2	7,098.7	7,136.0	7,074.4	6,844.4	6,760.8	6,752.0
Total U.S.	87,514	87,751	88,654	89,233	90,081	90,914	90,018	90,093	90,629	91,062	91,288	91,394

Source: U. S. Department of Labor, Bureau of Labor Statistics, Supplement to Employment and Earnings, Revised Establishment Data (Jan., 1977-Mar., 1980) (September, 1980), Employment and Earnings (March, 1981).

Table 5A: U.S. Travel/tourism Transportation Consumption of Petroleum, 1979-80

(millions of barrels)

Sector	1979	1980p	1980 percent Distribution	1980/79 percent change
Travel/tourism				
Certificated air[1]	221.2	215.8	3.5%	- 2.5%
General aviation[2]	32.0	34.1	0.5	+ 6.6
Intercity bus[3]	3.0	3.1	*	+ 2.5
Amtrak[4]	2.2	1.9	*	-12.5
Auto/truck/RV/motorcycle[5]	319.2	307.1	4.9	- 3.8
Total	577.6	561.9	9.0	- 2.7
Local personal passenger vehicle transportation[5]	1,591.1	1,558.0	25.0	- 2.1
Other Transportation[5]	1,396.0	1,205.5	19.4	-13.6
Total transportation[6]	3,564.7	3,325.4	53.4	- 6.7
Industrial[6]	1,761.1	1,646.3	26.4	- 6.5
Residential and commercial[6]	888.0	774.9	12.4	-12.7
Electric utilities[6]	543.2	478.4	7.7	-11.9
TOTAL PETROLEUM CONSUMPTION[6]	6,757.0	6,224.2	100.0	- 7.9

Note: details may not add to totals due to rounding.
* less than .05 percent. p = preliminary
Source: U.S. Travel Data Center

[1]Civil Aeronautics Board. [2]Federal Aviation Administration. [3]American Bus Association for Class I intercity carriers. [4]Amtrak. [5]Estimated by the U.S. Travel Data Center based upon the 1977 Nationwide Personal Transportation Study and Federal Highway Administration data. [6]U.S. Department of Energy, Monthly Energy Review, May, 1981.

Table 5B: U.S. Domestic Consumption of Energy, 1979-1980

(quadrillion Btu)

	1979	1980
Travel/tourism transportation	3.128	3.039
Local personal passenger vehicle transportation	8.616	8.427
Motor Gasoline	13.487	12.649
Transportation	19.950	18.628
Total domestic energy consumption	78.968	76.201

Source: U. S. Travel Data Center, based on data from Table 5A and U. S. Department of Energy, Monthly Energy Review, May, 1981.

Table 6A: U.S. International Travel Receipts, Payments and Balance, 1972-1981 Projected

($ millions)

	1972	1973	1974	1975	1976	1977	1978	1979	1980	Projected 1981
Receipts from foreign visitors in the U.S.	$ 2,817	$ 3,412	$ 4,032	$ 4,697	$ 5,742	$ 6,150	$ 7,186	$ 8,335	$10,090	$11,650
Payments of U.S. travelers in foreign countries	5,042	5,526	5,980	6,417	6,856	7,451	8,475	9,413	10,397	11,650
Balance on travel receipts less payments	-2,225	-2,114	-1,948	-1,720	-1,114	-1,301	-1,289	-1,078	- 307	0
World international travel receipts	$24,200	$27,600	$34,100	$38,600	$43,700	$52,400	$65,100	$79,000	$92,000	N/A

Source: Bureau of Economic Analysis, U.S. Department of Commerce, Survey of Current Business, Vol. 60, No. 5 and Vol. 61, No. 5; 1981 projection from U.S. Travel Service, U.S. Department of Commerce

N/A: not available.

Table 6B: U.S. International Passenger Fare Receipts, Payments and Balance, 1970-1981 Projected

($ millions)

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	Projected 1981
U. S. passenger fare receipts from foreign travelers	$ 377	$ 425	$ 494	$ 718	$ 813	$ 767	$ 937	$1,025	$1,238	$1,677	$2,053	$2,400
U.S. passenger fare payments to foreign carriers	1,215	1,290	1,596	1,790	2,095	2,263	2,568	2,748	2,896	3,184	3,607	3,900
Balance of passenger fare receipts less payments	- 838	- 865	-1,102	-1,072	-1,282	-1,496	-1,631	-1,723	-1,658	-1,507	-1,554	-1,500

Source: Bureau of Economic Analysis, U.S. Department of Commerce, Survey of Current Business, Vol. 60, No. 5 and Vol. 61, No. 5; 1981 projections from U.S. Travel Service, U.S. Department of Commerce

Table 6C: Total U.S. and World Receipts from International Travel and Transportation, 1972-1981 Projected

($ billions)

	1972	1973	1974	1975	1976	1977	1978	1979	1980	Projected 1981
U. S. International Travel and Passenger Fare Receipts	$3.31	$4.13	$4.85	$5.46	$6.68	$7.18	$8.42	$10.01	$12.14	$14.05
World International Travel and Passenger Fare Receipts	$24.2	$27.6	$34.1	$38.6	$43.7	$52.4	$65.1	$ 79.0	$ 92.0	N/A

Source: Bureau of Economic Analysis, U.S. Department of Commerce, Survey of Current Business, Vol. 60, No. 5 and Vol. 61, No. 5; World Tourism Organization

N/A: not available

Table 7A: U.S. Resident Travel by Destination Region, 1980
(millions)

Travel Region	Person-trips	Person-nights
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	37.4	191
Eastern Gateway: New Jersey, New York	46.8	187
G. Washington Country: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia	74.8	277
South: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee	224.4	1,032
Great Lakes: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin	149.6	539
Mountain West: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming	56.1	275
Frontier West: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas	149.6	569
Far West: Alaska, California, Idaho, Nevada, Oregon, Washington, Hawaii	130.9	694
Outside U.S.	65.5	537
Total	935.1	4,301

Note: Details may not add to totals due to rounding.
Source: U.S. Travel Data Center, National Travel Survey, includes only trips to places 100 miles or more away from home.

Table 7B: Travel Expenditures by U.S. and Foreign Visitors, by Travel Region, 1978. ($ billions)

Travel Region	U.S. Travel expenditures	Foreign visitor expenditures	Total travel expenditures
New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont	$ 7.3	$0.4	$ 7.7
Eastern Gateway: New Jersey, New York	11.5	1.2	12.7
G. Washington Country: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia	11.3	0.3	11.6
South: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Tennessee	25.5	1.2	26.7
Great Lakes: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin	21.5	0.4	21.9
Mountain West: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming	6.0	0.2	6.2
Frontier West: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas	15.6	0.6	16.2
Far West Alaska, California, Idaho, Nevada, Oregon, Washington, Hawaii	23.7	2.7	26.4
U.S. Overall	$122.6	$6.9	$129.5

Note: Details may not add to totals due to rounding.
Source: U.S. Travel Data Center's Travel Economic Impact Model, includes overnight trips and day-trips to places 100 miles or more away from home.

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ERRATA

Figures 6A and 6B should be corrected as follows: In Figure 6A on page 26, the solid and broken lines in the legend should be reversed. Following is the correct version:

FIGURE 6A
THE INTERNATIONAL TRAVEL SPENDING GAP NEARLY CLOSED IN 1980

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 6A.*

continued . . .

In figure 6B on page 26, the solid and broken lines in the legend should be reversed. The correct version follows:

FIGURE 6B
U.S. INTERNATIONAL PASSENGER FARE DEFICIT HAS NOT IMPROVED

SOURCE: *U.S. TRAVEL DATA CENTER, TABLE 6B.*

U. S. Travel Data Center
1899 L Street, N.W., #610
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July, 1981